HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Manitoba

CANADA MORTGAGE AND HOUSING CORPORATION

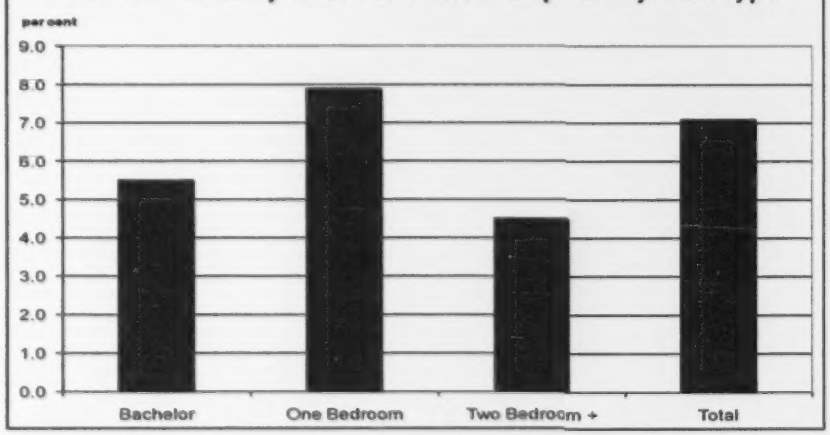
Date Released: 2011

Highlights

- The overall vacancy rate for standard units in retirement homes across Manitoba stood at 7.1 per cent in 2011 compared to 7.9 per cent in 2010.
- The overall, average rent for a standard retirement home unit was $2,227 in Manitoba in 2011, up from $2,112 one year earlier.
- In Manitoba in 2011, there were 35 facilities surveyed containing a total of 3,648 units and housing 3,872 residents.

Figure 1

Manitoba Vacancy Rates of Standard Spaces by Unit Type



Source : CMHC

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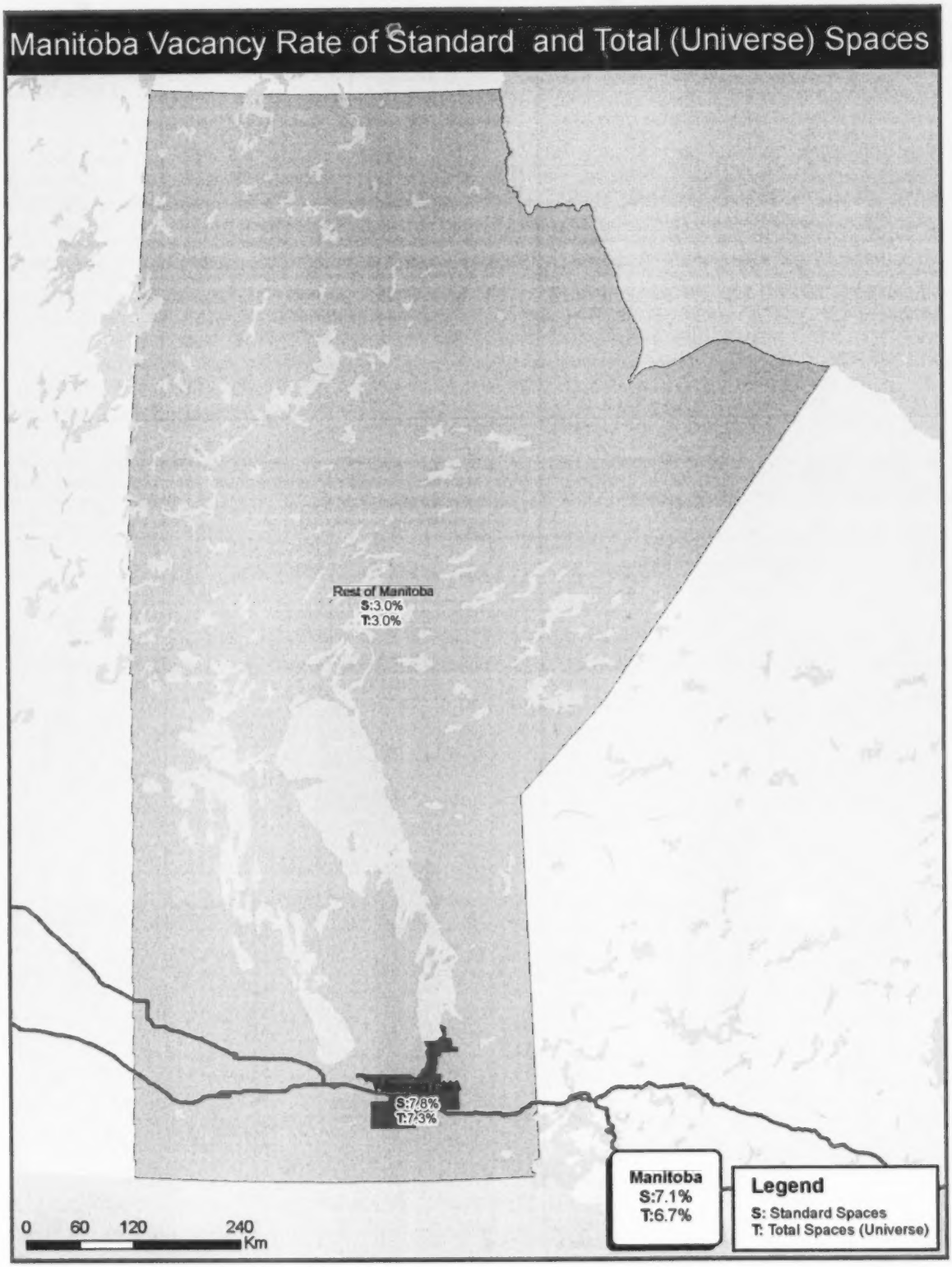

Manitoba Vacancy Rate of Standard and Total (Universe) Spaces
Rest of Manitoba
S:3.0%
T:3.0%
S:7.8%
T:7.3%
0 60 120 240
Km
Manitoba
S:7.1%
T:6.7%
Legend
S: Standard Spaces
T: Total Spaces (Universe)

Vacancy Rates

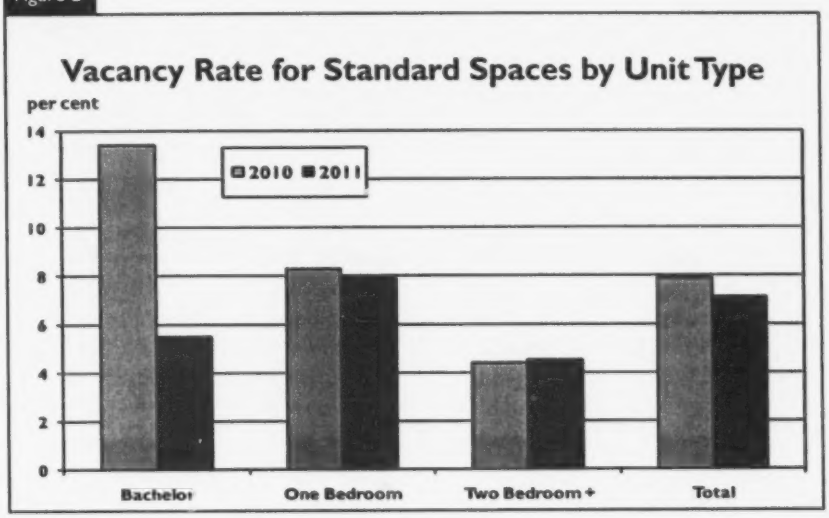
Vacancies edge lower

According to Canada Mortgage and Housing Corporation's (CMHC) 2011 Senior's Housing Survey, the vacancy rate in senior's rental residences in the province of Manitoba stood at 7.1 per cent in 2011, down from 7.9 per cent in 2010. The seniors' survey targeted only private and non-profit retirement structures where the majority of residents are over age 65 and have access to additional services not offered in traditional rental structures such as meal service, housekeeping, and laundry. The total number of such residences surveyed across the province in 2011 was 35.

The decline in vacancy was felt more strongly outside the Winnipeg Census Metropolitan Area (CMA) where the average vacancy rate declined from 12.0 per cent in 2010 to 3.0 per cent in 2011. The number of units outside the CMA is much smaller and represents only 13 per cent of the provincial total; therefore a slight change in the number of vacant units can greatly affect the vacancy rate. In contrast to the Rest of Manitoba, the average vacancy rate for standard retirement spaces within the Winnipeg CMA increased to 7.8 per cent in 2011 from 7.1 per cent one year prior.

Vacancy rates in Manitoba's seniors' rental residences declined most significantly in bachelor suites, where 5.5 per cent of these type of units were vacant in 2011 compared to 13.4 per cent in 2010. Vacancies were lowest in units with two bedrooms or more where the vacancy rate was 4.5 per cent in 2011, almost identical to the 4.4 per cent rate posted one year earlier. One bedroom units recorded the highest vacancy rate at 7.9 per cent, slightly lower than the 8.3 per cent vacancy rate that was recorded in 2010.

Figure 2



Source: CMHC

Vacancy rate highest in upper rent range

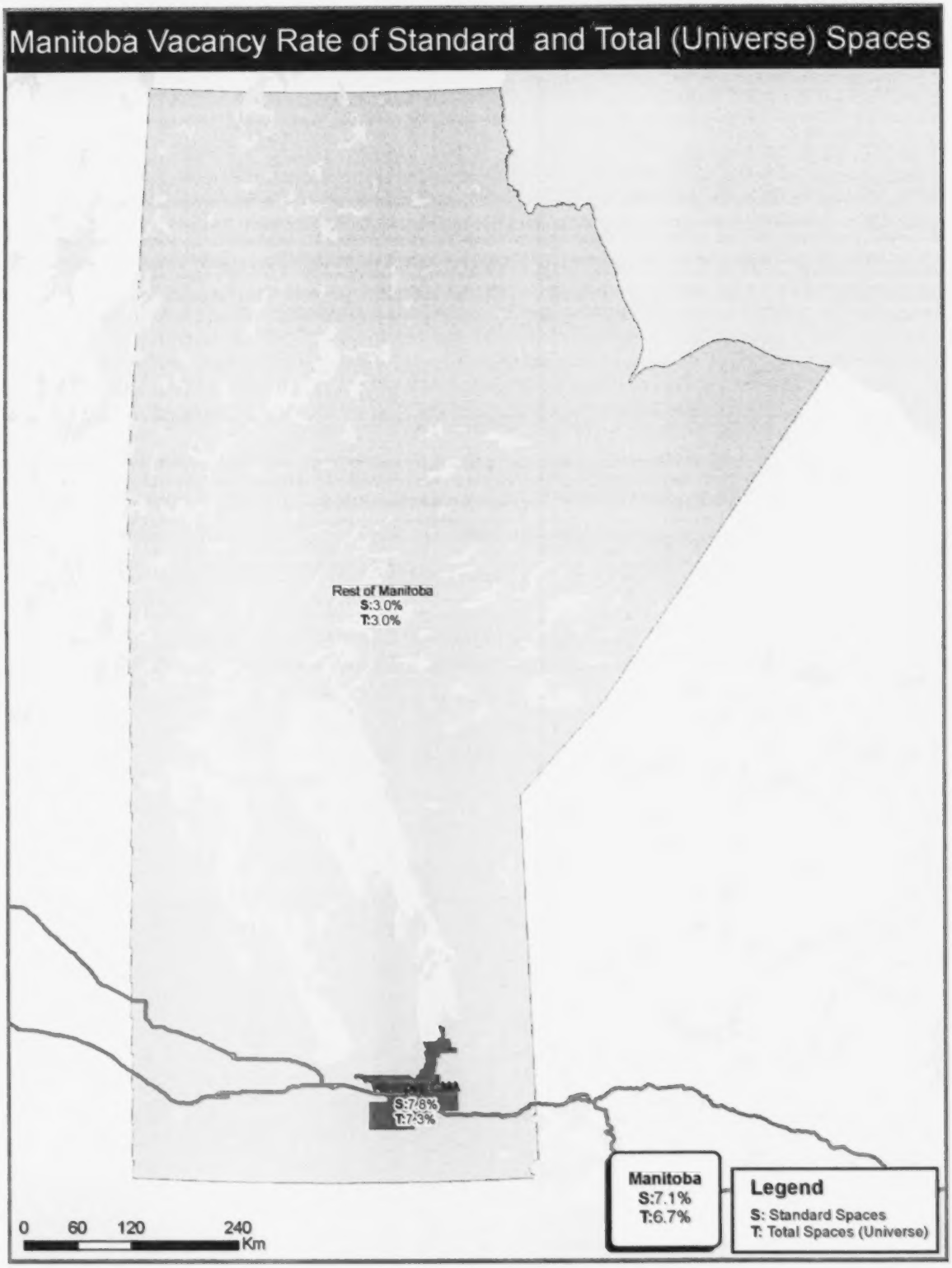
The highest vacancy rates in the province were recorded in those units with the highest rents. Units renting for $2,500 and more per month recorded a vacancy rate of 15.4 per cent at the time of the survey. This vacancy rate was more than double the provincial average, but represented a slight decrease from the 16.3 per cent vacancy rate recorded during the 2010 survey. The lowest vacancies were recorded in units renting between $1,500 and $1,999, with a rate of 2.5 per cent in 2011. This is also the rent range that recorded the largest decrease in vacancies as the 2010 survey reported a vacancy rate of 5.9 per cent. Vacancies also declined in units renting between $2,000 and $2,499, from 6.4 per cent in 2010 to 4.2 per cent in 2011. Overall the vacancy rates among units renting less than $2,500 were all appreciably lower than the 7.1 per cent average for Manitoba.

Rents

Average monthly rents higher in Winnipeg CMA

The average rent charged for seniors' units of all types on a province-wide basis in 2011 was $2,227 per month, an increase from $2,112 in 2010. Rents were greater within the Winnipeg CMA where the average rent for all types of units was $2,283 in 2011, compared to $1,871 in the rest of the province. The highest average rent was for two-bedroom plus units in Winnipeg at $2,746, which was higher than the average rent of $1,861 for a similar unit outside of the CMA.

More than 90 per cent of all seniors' rental units in the province charged $1,500 or more per month in rent. The largest share of units (39 per cent) rented for between $2,000 and $2,499 per month, followed by units charging $2,500 and more per month at 30 per cent.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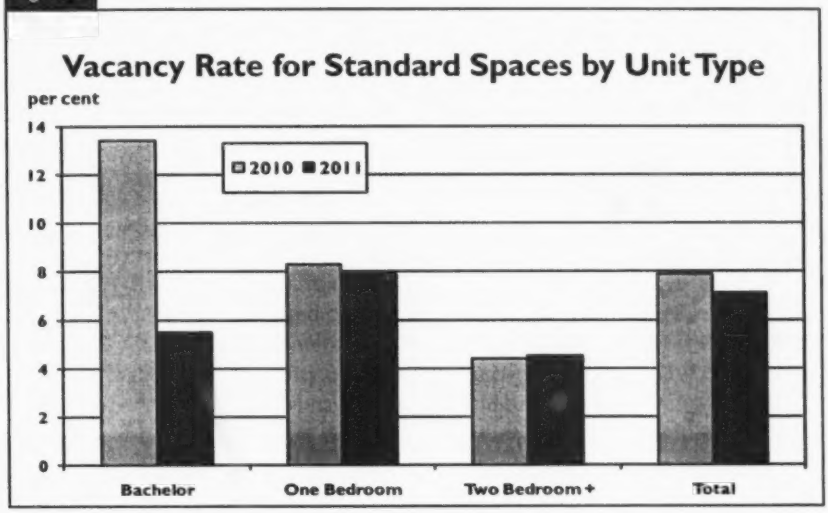

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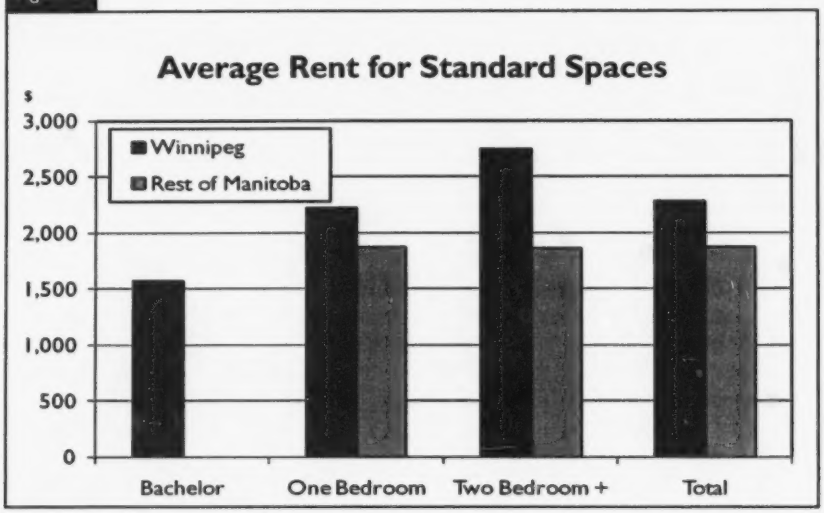


Source: CMHC

Vacancies and rents lowest in older buildings

Older buildings (those opened before 1990) had the lowest vacancy rate at 1.4 per cent, and these units also had the lowest average rent at $1,901 per month. Next lowest were newer buildings opened in 2000 or after, where the vacancy rate was 7.0 per cent in 2011, almost identical to the 6.9 per cent vacancy rate recorded one year earlier. Units in buildings opened between 1990 and 1999 had the highest vacancy rate at 10.6 per cent; however this was much lower than the 14.6 per cent recorded in 2010.

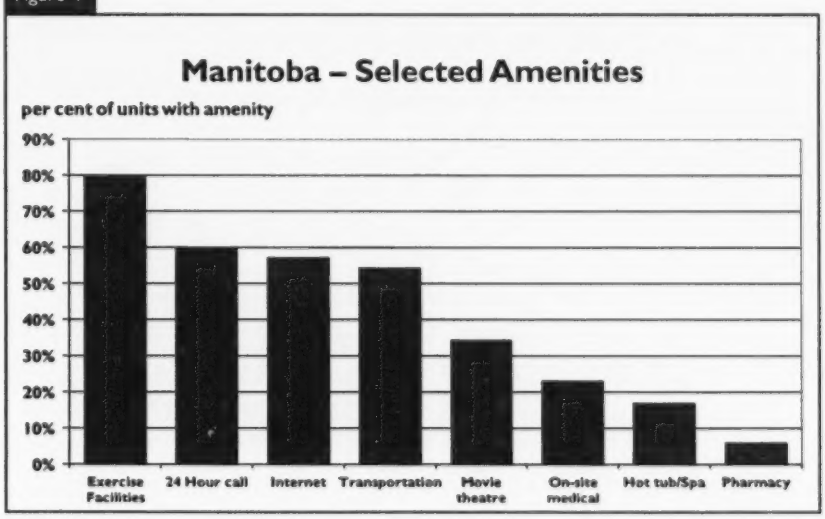
Variations in services and amenities

The services available within seniors' facilities varied across the province. All facilities surveyed offered some form of meal plan, although the level of provision varied. Across the province, only 8.6 per cent of structures had optional meal programs and opting out of meals was not possible in all structures larger than 90 units. The majority of units (54.3 per cent) included three daily meals with rent and 37.1 per cent included two meals per day.

With respect to medical services, larger structures were able to offer more variety. The most prevalent service was a 24-hour call bell which was available in 60 per cent of all units in the province. On-site medical services were present in 23 per cent of all units in the province and registered nurses were present in 14 per cent of units. Of structures greater than 90 units, on-site medical services were present in 30 per cent of units and a registered nurse on-site in 22 per cent of units. Smaller structures, between 10 and 49 units, did not offer either of these services.

The most commonly available amenity was access to an exercise facility, available to 80 per cent of all units in the province. This was followed by internet access at 57 per cent and transportation services at 54 per cent. Among other services provided were movie theatre (34 per cent), a spa or hot tub (17 per cent), and a pharmacy (5.7 per cent). Once again, larger structures were able to offer the greatest variety of services.

Figure 4



Source: CMHC

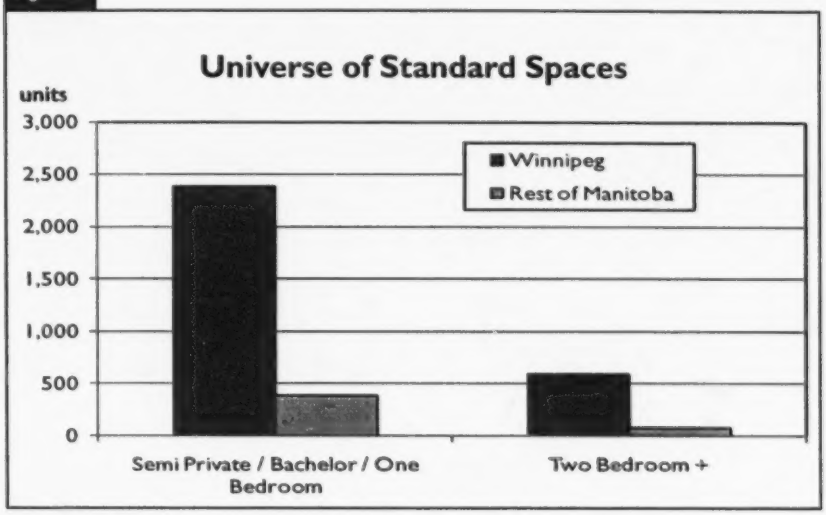
Universe

Survey coverage

There were 3,446 standard retirement senior's spaces surveyed by CMHC in 2011, with an additional 202 non-standard spaces. Standard spaces are defined as those where the resident receives less than 1.5 hours of care per day. The vast majority of the universe, 70 per cent, was comprised of one-bedroom units followed by two bedroom units at 19 per cent. Of the total seniors' spaces, 87 per cent were located within the Winnipeg CMA.

The 3,648 surveyed units in 35 residences housed 3,872 residents, 4.6 per cent of Manitoba's population over 75 years of age.

Figure 5



Source: CMHC

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1.1 Vacancy Rate (%) of Standard Spaces by Unit Type
Manitoba

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011
Winnipeg CMA	--	--	12.3 b	5.6 b	7.4 b	8.9 b	4.6 b	4.1 b	7.1 b	7.8 b
Rest of Manitoba	--	--	**	**	13.2 b	1.7 b	3.7 b	7.3 b	12.0 b	3.0 b
Manitoba	--	--	13.4 a	5.5 a	8.3 a	7.9 a	4.4 a	4.5 a	7.9 a	7.1 a

1.2 Vacancy Rate (%) of Standard Spaces by Rent Range ($)
Manitoba

Centre	Less than $1,000		$1,000 - $1,499		$1,500 - $1,999		$2,000 - $2,499		$2,500 and more		Total where rents are known	
	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011
Manitoba	3.2 a	**	2.0 a	2.9 a	5.9 a	2.5 a	6.4 a	4.2 a	16.3 a	15.4 a	7.8 a	7.1 a

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Manitoba

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2010	2011				
Winnipeg CMA	3,177	6.6 b	7.3 b	28	3,326 b		
Rest of Manitoba	471	11.9 b	3.0 b	7	546 b		
Manitoba	**3,648**	**7.3 a**	**6.7 a**	**35**	**3,872 a**	**83,400**	**4.6**

[1] Source: Statistics Canada, Population Projections for Canada, Provinces and Territories, 2009-2036, Scenario 3.

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

2.1 Universe of Standard Spaces by Unit Type
Manitoba

Centre	Semi Private / Bachelor / One Bedroom	Two Bedroom +	Total
Winnipeg CMA	2,386 a	591 a	2,977 a
Rest of Manitoba	387 a	82 a	469 a
Manitoba	**2,773 a**	**673 a**	**3,446 a**

2.3 Universe of Standard Spaces by Rent Range ($)
Manitoba

Centre	Less than $1,000	$1,000 - $1,499	$1,500 - $1,999	$2,000 - $2,499	$2,500 and more	Total spaces where rents are known
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]	
Manitoba	**	**	22.1 a	38.9 a	30.2 a	3,446

[1] % is based on those spaces where the rent is known.

2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Manitoba

Centre	Meals				On-Site Medical Services	Registered Nurse onsite	24-hour call bell
	Optional	# included in rent					
		1	2	3			
Manitoba	**8.6 a**	**0.0 a**	**37.1 a**	**54.3 a**	**22.9 a**	**14.3 a**	**60.0 a**
10 - 49	20.0 a	0.0 a	0.0 a	80.0 a	0.0 a	0.0 a	60.0 a
50 - 89	28.6 a	0.0 a	42.9 a	28.6 a	14.3 a	0.0 a	28.6 a
90 or more	0.0 a	0.0 a	43.5 a	56.5 a	30.4 a	21.7 a	69.6 a

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

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a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
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2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Manitoba

Centre	Pharmacy	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Manitoba	**5.7 a**	**54.3 a**	**0.0 a**	**17.1 a**	**34.3 a**	**80.0 a**	**57.1 a**
10 - 49	0.0 a	20.0 a	0.0 a	0.0 a	0.0 a	0.0 a	0.0 a
50 - 89	0.0 a	28.6 a	0.0 a	14.3 a	28.6 a	71.4 a	28.6 a
90 or more	8.7 a	69.6 a	0.0 a	21.7 a	43.5 a	100.0 a	78.3 a

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Manitoba

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011
Winnipeg CMA	--	--	1,553 a	1,567 a	2,100 a	2,217 a	2,607 a	2,746 a	2,169 a	2,283 a
Rest of Manitoba	--	--	**	**	1,798 a	1,868 a	1,773 a	1,861 a	1,795 a	1,871 a
Manitoba	**--**	**--**	**1,600 a**	**1,630 a**	**2,053 a**	**2,169 a**	**2,500 a**	**2,638 a**	**2,112 a**	**2,227 a**

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

O2 Building Structure Makeup (%)
Manitoba

Centre	Concrete Frame	Wood Frame
Manitoba	34.3%	65.7%

O3 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
Manitoba

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional ($)
Winnipeg CMA	Cable	53.6	39.3	7.1	**
	Telephone	7.1	89.3	3.6	**
Rest of Manitoba	Cable	28.6	71.4	--	--
	Telephone	--	100.0	--	--
Manitoba	Cable	48.6	45.7	5.7	**
	Telephone	5.7	91.4	2.9	**

O4 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Manitoba

Centre	Before 1990	1990 - 1999	2000 or later	Total
Manitoba	1.4 a	10.6 a	7.0 a	7.1 a

O5 Average Rents ($) of Standard Spaces by Date Residence Opened
Manitoba

Centre		Before 1990	1990 - 1999	2000 or later	Total
Manitoba	Bachelor	**	**	1,654 a	1,630 a
	One Bedroom	1,911 a	2,158 a	2,204 a	2,169 a
	Two Bedroom +	**	**	2,704 a	2,638 a
	All	1,901 a	2,083 a	2,291 a	2,227 a

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became National in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe. Non-profit residences must have at least one unit that is not subsidized.

To be eligible for inclusion in the 2011 Survey results, a residence must:

- ✓ Have been in operation for at least one year, i.e. before January 2010
- ✓ Have at least 10 rental units (Quebec, Ontario, Prairies) or 5 rental units (Atlantic provinces and B.C).
- ✓ Offer an onsite meal plan
- ✓ Does not provide high levels of healthcare (defined as 1.5 hours or more of care per day) to all of their residents. Nursing homes and long-term care homes are examples of residences that were not included in the survey.
- ✓ Offer rental units. Life lease units and owner-occupied units are excluded from this survey.
- ✓ And at least 50% of resident's are 65 years of age or older

The Seniors' Housing Survey is a census and not a sample survey therefore all senior's residences in Canada meeting these criteria are included to be part of this survey.

Survey data were obtained through a combination of telephone interviews and fax and email responses. Information was obtained from the owner, manager, or residence administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, to ensure that they are reflective of the universe. 2010 data in this publication may differ from what was published last year, due to survey zone changes in 2011. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include: one-half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard Space: A space occupied by a resident who does not receive a high level of care (i.e. the resident receives less than 1.5 hours of care per day.) Regional terms for this type of space vary across the country. In cases where there is no additional charge paid for a high level of care, the estimate of the number of standard spaces may include units where the resident receives a high level of care.

Heavy Care Space: A space where the residence provides 1.5 hours or more of healthcare per day to the resident. Examples include Alzheimer, Dementia and mobility support residents. Heavy care space estimates for occupied spaces may only include those where the resident is required to pay for a high level of care.

Respite Space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or Subsidy Space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: Refers to the actual amount a resident pays per month for their accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture Rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population and then expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the cooperation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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